

**KHRIS NCP Benefits and Benefits Accounting User Group Meeting
School Boards – June 7, 2012**

Meeting Notes

Participants

School Representatives:

Kara Rose, Chris Jones, Kay Huffman, Heidi Yates, Damian O'Brien, Djakarta Ellis, Janet Abner, Pam Taylor, Becky Sewell, Michele Nelson, Faye Allen, Wanda Bradley

KDE Representatives:

Charlie Hall, Pat Boyd

Personnel Cabinet:

DEI: Jenny Goins, Donna Cordier, Cindy Stivers, Paula Chisholm, Peggy Willhite, Annette Osborne, Michelle James, Stephanie May, Kim Collins

KGLI: Joe Hughes, Kim Quinn

DTS / KHRIS: Robbie Perkins, Jill Anderson, Debbie Weber, Lisa Shelton

Personnel Cabinet: Walt Gaffield

Discussion

1. Review Goals, Objectives and Expectations

- No discussion related to this
- Comment made that ICs doing are doing a better job getting specific information to staff to research and resolve issues

2. KASBO Conference

- Incorporated slides from KDE to presentation; posted presentation on KEHP website under 2012 IC Training and Information page
- **ESS** – updating for use all year for new employees not just Open Enrollment (OE)
 - Need something to talk employees through how to go online as new hire, not just OE
 - Updated, but will review again to ensure this helps new hires and Life, Health and KHRIS will review then let members from this group review before sending to all ICs and posting to the web
 - Schools send e-mail reminders after school starts so they could promote the ESS tool and the instructions for using
 - Timeframe for new instructions – goal is for 45 days but definitely before OE
- **Production Code** – related to payment on accounts (credits – don't know where to apply)
 - Instructions to set new filter in User Guide to pull information they need; but they want the proposed items to be broken out by insurance object
 - Staff will look at this to see if there is anything we can do, but system currently doesn't have ability
 - Systematically there is no way to ever break out the bills separately
- **Discussion continued related to:**
 - Deleting items on bill doesn't fix it; notes have limited use
 - What is on bill is what is in active enrollment system; if not we need specifics to address each case
 - Timing issues: QEs, etc., create issues; EIB staying caught up with incoming applications and update/change forms and working audit reports
 - Billing reconciliation process has changed and we have to work in new system and continue to improve communication between business and ICs

3. Submitted Discussion Topics

- **MUNIS ESS process**

- Individual districts, like Fayette County, use their own ESS through MUNIS
- Can the schools who use this send an import file directly from their ESS to KHRIS; this is outside of the MUNIS file
- File would have just demographic data (name and address changes)
- MUNIS will not take on because not all schools implementing; unless multiple districts take this on and it becomes more cost effective
- KHRIS cannot take files from individual school districts; KDE aggregates data from all school districts and sends one file to KHRIS
- If ESS becomes more widely used by the school districts and KDE can accept files and aggregate then send to KHRIS it might be possibility in the future; would have to be well over half the districts implementing ESS to consider KDE taking the data
 - School districts often use their own version of MUNIS and pay for changes

- **Biller Direct**

- New process is helpful
- Why some people broken out and others are grouped together?
 - Need specific examples of when this happens; send to DEI/FMB contact or for KGLI Joe Hughes

- **Billing Date**

- Is it possible to move the dates for processing bills and invoices?
 - No way to schedule in a way that pleases all NCP groups
- We don't have a nightly feed anymore so this could create timing issues
- Reminder that a schedule has been posted on the KEHP.ky.gov site under the IC area on 2012 Plan Year page
- DEI will work to coordinate when we make any changes to a record that we contact the IC; i.e. retriggering issues, cross-reference, etc.

- **Close Schedule and Process**

- Bills have to be closed out monthly to meet auditing requirements
- We need IC assistance to ensure bills are worked and bills are closed timely
- Effective July 1 DEI will take more proactive approach to holding ICs accountable to working bills; an automated process will send a letter when a member's account is overdue to the member and IC stating the insurance will be termed for non-payment if not paid within a 90-day timeframe

4. Update on Enhancements/ Defect Changes (list from first User Group meeting)

- **Benefits**

- FSA Remapper – combine FSA totals for members who have had two FSAs in a plan year
- Humana file issue; several of these
- Multiple Human file issues: terminations processed incorrectly; future dated dependent/SSN; various other Humana file issues
- Humana interface to update participation date for health plan; issue with having to retrigger dates
 - All Humana fixes should be in place in next couple of weeks

Additional information: All Humana file issues have been tested and released to production on

Friday 6/15. So far we have not received any additional reports from ICs or staff about file problems

- Fayette County Attorney change – new quasi agency
 - In production
- Pike County – new quasi agency
 - In production
- Summer Transfer – KHRIS and MUNIS; KDE is working with DEI, KGLI and KHRIS staff to test solution

Additional information: An informal test file was delivered to KHRIS team on Monday 6/18. The purpose was to review fields, not to run it through the test system. The file was reviewed, discovered problems with dates and sent a status back to Pat Boyd Tuesday 6/19. KHRIS has received a formal test file this week and are still reviewing. Once it has run through KHRIS test box using normal file processing methods, then, all members including Vickie Poole, will review the results and make a determination on readiness for production.

- Once districts have go ahead dates of July 31 or Aug. 15 or Aug. 31 can be used for Life and Health end dates
- Difference in termination and transfer **in**; the only update forms to send to EIB are employees **transferring into** your school; IC Memo 12-14 references this
- Salary changes for Life Insurance
 - MUNIS enhancement; will work once Summer Transfer completed
 - Will be automated process; ICs don't have to do anything; Nov. 1 effective date
- Audit report – returning errors it should not
 - Corrected one issue but found another; DEI internal issue

- **Benefits Accounting**

- August billing issue and AARS – internal accounting issues related to cost allocation
 - Top 1 of top 3 priorities; business testing soon
- Enrollment organization changes
 - Moved down in priority
- Life changes – wrong description; correcting field
 - In production
- Clarification of overpayment
 - On list of priorities
- Duplicate SSNs – employee with name changes, this will correct bills
 - Internal process
- Fayette County Attorney change – new quasi agency
 - In production
- FP04 – security
 - Still on list of priorities; internal DEI and KGLI
- Payments to agency posting to clarifications; no partial clearing allowed
 - Still on list of priorities
- Group FP20 Total list – internal issue
 - Still on list of priorities
- New top priorities: Reconciliation process; major rewrite related to payroll; federal rescission law requiring system changes related to health insurance

- **Additional discussion items**

- Billing history report; submitted request but low priority given other needs
- User Guide being updated to show how better to process rehires with 0 day break in coverage; best practice is to copy information; in the meantime send information on update form
- Several agency specific issues brought up and staff researched and corrected while User Group met

5. New Items for Discussion

- Clarification items
 - DEI reviews once a day; KGLI reviews throughout day
 - Last meeting it was requested to review whether once in clarification can an e-mail go to DEI or KGLI staff to let them know to work; system doesn't have workflow functionality for this or for the ICs to receive an e-mail once bill goes out of clarification
 - All clarifications need to be researched and this may require additional time to clear bill
 - Critical that ICs communicate with DEI/KGLI if there are issues
 - KHRIS requires much more two-way communication between ICs and DEI/KGLI staff
 - As a general rule items go in clarification on people you add or whose amount has changed
 - Look for term "SIBRDUMMY"—this is when you have a person you add to the bill but the person has not been added in the enrollment side
 - See pages 87-89 of Benefits Accounting User for instructions
 - Legacy allowed you to add a person to the bill and it would apply the money; with KHRIS the money cannot be applied if the person has not been enrolled
- Two or three outstanding issues related to employees with two pernr
 - A person who is coming in, the IC can see the pernr of the transfer but it's giving them the wrong pernr
 - SSN search should bring up all pernr associated with that SSN
 - Start date of 10/1 then realize it should have been 9/1, if the bill has already run for that month we have to complete a null term and delete the existing elections; if that's not done correctly it could create issues
 - Could be related to insurance objects
 - This issue has been logged with DAB
 - Specific examples will be researched along with research on how to proactively check for these issues with a report
- If you do not receive a daily import file notify KDE – affects districts that are on the cloud
- W-2s – health insurance premium information must be added; data will come from KHRIS to KDE and KDE will then send to districts through MUNIS
- New Insurance Coordinator Training
 - Member Services Branch reviewing
 - Commitment to update KHRIS User Guides and KEHP Administration Manual quarterly
- Separate Bills

- Is not a possibility – it would be breaking SAP functionality and require significant customization
- Were notes from the last meeting distributed to ICs?
 - IC Memo 12-16 was sent to NCP ICs and Billing Liaisons, along with a copy of the last User Group meeting minutes, on April 16
- Notes on Bills
 - Do we need to remind ICs to use notes on bills?
 - Impossible because of the mass number of notes to read every note, but we are working on process to use the information from the notes
 - One example is reviewing a way to pull out any note on a report that is related to a term so EIB can follow up with IC to determine if member needs to be termed; EIB cannot see notes put on bill so they are working with FMB and DAB to build a report to use
 - There is a character limit, but you will get an error message if you hit that limit
 - Notes are helpful to you and can be helpful to us
 - From a Life Insurance standpoint please note that “term” and “cancel” mean two different things; cancelling a life plan is handled differently and should always be sent to KGLI
- Next Meeting
 - Mid September timeframe at the earliest
 - Send responses on any new items to group that come up between meetings